View in browser

FinancialPlanning

Wealthtech Weekly

October 16, 2025

By Rob Burgess
Reporter

Over the past three years, I've watched AI enter advisor tech stacks, mostly in the back-office and behind the scenes. I've been watching closely to see if AI would move to the client-facing front office.

In Financial Planning's new "AI Readiness Survey," advisors expressed more than a little hesitancy to allow autonomous AI to rebalance client portfolios or make investment decisions.

Would you let AI take the wheel in this way? Let me know — robert.burgess@arizent.com.

I hope you'll check out this article, along with the rest of this week's stories.

As always, thank you for reading. Talk to you next Thursday!

Connect with Rob:

WEB SEMINAR

Serving the whole client: Why holistic wealth management is the future of advice

Hosted by Financial Planning

Partner Insights from Vanilla

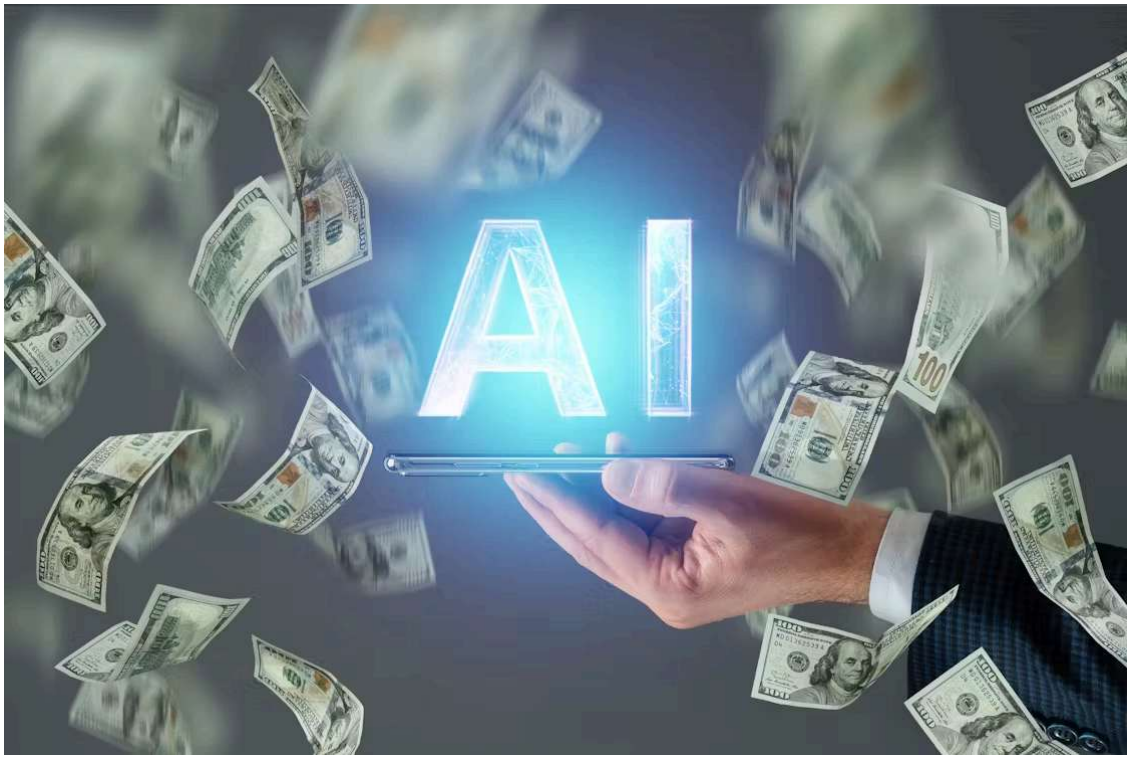
November 11, 2025 | 2 p.m. ET/11 a.m. PT

REGISTER NOW

TOP STORIES

TECHNOLOGY

Most advisors see AI in investing as a risk



Allowing artificial intelligence to make investment management decisions poses an organizational threat, according to the majority of advisors in Financial Planning's AI Readiness Survey.

- **How advisors can avoid legal pitfalls of AI use**
  Financial Planning's AI Readiness Survey found that advisors are already using AI for creating legal document summaries and seeing results, but legal experts warn that undisclosed, unmonitored use could open firms up to liability.
- **Returns on comic books rarely go up, up and away**

Issues that feature a character's first appearance or death — or even a popular artist or writer's first publication — can command high prices. But a volatile short-term investment market and meticulous storage demands remain concerns.

- **How one small tweak can boost advisor search visibility**
  AI-powered search results have changed how SEO works. Simple tweaks can help financial advisors and their firms show up much more frequently in no-click search results, experts say.
- **Strong social media policies shield wealth firms from potential fallout**
  After right-wing activist Charlie Kirk was killed, some workers found out the hard way that personal social posts had professional consequences. Experts say the time for firms to strengthen policies is now.

Read the latest in Wealthtech

PARTNER INSIGHTS FROM EQUITABLE ADVISORS

Maintaining firm autonomy when sharing technology, people and processes

In this Q&A article with David Karr, chairman of Equitable Advisors, gain perspective on how financial advisors can leverage shared resources and lean into AI to more efficiently.

You're receiving this email because you signed up for Editorial emails from Financial Planning.

To update the emails you want to receive, or to unsubscribe from our mailing list, please visit our Email Preference Center.

arizent

Arizent
360 Madison Avenue, 8th Floor
New York, NY 10017

About | Subscriptions | Contact | Privacy Policy

Have questions or concerns? Contact Support

Follow us in real time: